

Chapter 3

New Emigration and Portuguese Society: Transnationalism and Return



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3.1 Introduction

Emigration was the subject of abundant research in Portugal until the 1970s. Outflows to escape poverty, often targeting the less privileged segments of the labour markets in the host countries, had been common since the late nineteenth century. For decades, most of these flows followed a post-colonial pattern and went to Brazil. Later, from the late 1950s to the early 1970s, Portugal was one of the main suppliers of migrant workers to Western Europe. Emigration reached its peak between the late 1960s and early 1970s. Afterwards, the statistics showed a significant decrease in outflows. This led some scholars to believe in its progressive disappearance. Scientific research and public opinion at first followed the apparent decrease in outflows but gradually lost interest in the subject.

However, episodic studies on recent emigration have shown that the flows never disappeared, even during the period of economic expansion and collective optimism

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of the late twentieth and early twenty-first centuries. Research on emigration after the mid-1980s helped to counterbalance the one-sided vision of a country of immigration (see Baganha 1993; Baganha and Peixoto 1997; Baganha and Góis 1998/1999; Baganha et al. 2002; Peixoto 2004; Marques 2008; Pires et al. 2010; Malheiros 2011, among others). These studies demonstrated that emigration continued, though some of its traditional forms and geographical routes were changing.

The global economic crisis that broke out in 2008 led to a surge in the number of Portuguese nationals leaving the country and so drew attention back to Portuguese emigration. The Portuguese economy had in fact been deteriorating since the early part of the twenty-first century. But the prolonged recession that started in 2008 led to a substantial increase in unemployment, a new impetus in emigration, a virtual halt on immigration and an increase of foreign immigrants returning home – especially after the Eurozone sovereign debt crisis and the austerity measures that followed in Portugal in 2011. Although the crisis reduced emigration to some former destinations such as Spain, this was offset by the appearance of new destinations, such as the emerging economies of Angola and Brazil. Public opinion turned its attention back to outflows and emigration became a topic of heated debate.

Despite the renewed significance of Portuguese emigration, prior to our study there had been rare comprehensive, up-to-date analysis of recent outflows, undertaken in order to understand the continuities and changes in relation to traditional emigration. The research project on which this chapter is based – “Back to the future: new emigration and links to Portuguese society” (REMIGR) – sought precisely to understand the extent and characteristics of recent emigration, especially the relationships that emigrants kept up with their country of origin, including new patterns of return (for an overview of the project’s main results, see Peixoto et al. 2016).

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At a theoretical level, the project's main research question was about the kind of relationship that new emigrants had with Portugal. This question is particularly relevant in view of the new features of recent outflows and the new context in which they occur. On the one hand, the new flows involve more skilled individuals than in the past, being also more temporary and more circular. On the other hand, the technological context has changed, thanks to ease of transportation and communication. In economic terms there has been greater deregulation of labour markets, and politically speaking it is easier to move around within the European Union.

The project sought to assess the dynamics and size of emigrant flows to different countries in the last decade; emigrants' sociodemographic characteristics; their main motivations (push or pull factors, supply or demand factors, individual or family-related factors); emigration strategies (short- or long-term migration, individual or family migration); the nature of contacts with Portugal (travel, family contacts, remittances); and future plans (settlement in the destination country, return or re-emigration). Knowledge of the duration of emigration (temporary or permanent, meaning by this the intention to remain abroad for less or more than 1 year) and ties with Portugal would help assess whether new emigrants were Portuguese nationals temporarily locating outside the country's borders or whether their emigration marked a profound change to Portuguese society. Significant evidence was also drawn from return movements in recent decades.

One of the main concerns of the project was how emigration would evolve after the crossroads at which Portugal found itself after the 2008 economic crisis and the subsequent bailout in 2011. Would new emigration be highly dependent on the economic situation, coming to an end after the country's economic recovery and then giving way to a new predominance of return and foreign immigration? Would it be a new kind of movement, creating new forms of transnationalism, in which circulation and international contacts would remain the norm? Or would it result in a long-term damage for Portuguese society, including the loss of many of its elites and much of its labour force – accentuating its peripheral status in Europe?

The situation in Portugal seemed to give rise to some issues that other European countries were experiencing, such as an increase in the outward mobility of their citizens – including of highly skilled people – to diverse destinations, and a simultaneous increase in different types of emigration (short-term, long-term, seasonal, etc.). Some of these issues had arisen from free movement in the EU, but others had not (like the choice of non-EU countries as destinations). After the global economic crisis, other general trends became even more significant. Several of the former “new immigration countries”, such as Spain, Greece and Ireland, experienced a decrease in immigration, while an increasing number of their nationals resorted to emigration again.

The evidence set out in the following sections covers part of the research project. First, we present a brief overview of recent theoretical trends on transnationalism and return, two understudied characteristics of Portuguese emigration. Second, using the data collected through the project's survey, we present an empirical reading of the transnational practices of recent Portuguese emigrants based on the links they maintain with their home country. Their plans for the future – settlement, return and re-emigration – are also identified and discussed. Third, the chapter examines

data on returning emigrants extracted from the 2011 Census – focusing especially on those who returned between 2001 and 2011. The evidence discloses a significant number of returns – at both working and retirement ages, and at all skill levels – thus revealing the unexpected complexity of recent movements.

3.2 Transnationalism and Return: Conceptual Remarks and Approaches to Portuguese Emigration

The use of the transnational perspective in migration studies started in the early 1990s, when some researchers, mostly anthropologists (Vertovec 2009), called attention to migrants living in more than one “chessboard”, that is, migrants whose daily lives involved multiple and diverse types of interconnection across national borders, establishing public and social identities with reference to more than one nation-state (Basch et al. 1994; Faist 2000). These so-called transmigrants develop a set of practices (economic, social, political...) that materialise links between space (or spaces) of destination and space of origin. They are inserted into the local labour markets of destination countries, have daily contact with these countries’ institutions and may participate in their political life. But, at the same time, they have regular virtual and/or physical connections with their places of origin, often contributing to their local economies (through remittances or business connections), to religious and civil society institutions (through the transfer of assets or money, or even by helping to run these organisations), to politics (through emigrant voting and even participation in political parties) or to cultural activities (Portes et al. 1999; Itzigsohn et al. 1999; Malheiros 2001; Baubock and Faist 2010).

Though this sort of double involvement of migrants in destination and origin societies is not exactly a new phenomenon, contemporary circumstances attributable to globalization and international mobility may have contributed to its increase. The reduction of relative distances attributable to the development of transport and communication, the continuous and relatively up-to-date information about what takes place everywhere in the world, the complexity of investment flows, the emerging elements of a global culture, and the increasing international integration of various labour markets have all facilitated the increase of transnational practices and contributed to the establishment of transnational social fields. These transnational social fields correspond to social practices and institutions built or used by migrants that connect their homelands and destinations countries, in which goods, capital, ideas and other resources circulate. But these social fields involve more than just exchange, because these resources are transformed and used up as they circulate (Levitt and Glick Schiller 2004).

Over the past 25 years, the transnational approach has become well established in migration theory. Even if transnational migrant practices are not an entirely new phenomenon, the transnational approach provides “the lens” that enables a better reading of the contemporary circulation both of migrants and of the goods, capital and ideas generated by migration, allowing us to break with crystalized perspectives

and old dichotomies (e.g. migration and return; emigrants and immigrants; places of destination and places of origin) (Portes 1999; Levitt and Sorensen 2004; Vertovec 2009). The development of the transnational perspective led to a refinement in academic approaches to migration and in the construction of categories, leading some authors to distinguish between domains (economical, political, cultural...) or levels of institutionalisation (Portes, Guarnizo and Landolt 1999; Itzigsohn et al. 1999), as well as levels of intensity (Góis 2005). The ideas of transnationalism “from above”, associated with multinationals or nation-state institutions, and “from below”, associated with migrants and grassroots organizations, have also been explored (Portes 1999; Malheiros 2001).

Research about Portuguese emigration that uses the transnational perspective has experienced significant growth in the past 20 years, accounting for approximately 13% of academic research on Portuguese emigration published between 1980 and 2013 (Candeias et al. 2014a, b). Nevertheless, this number encompasses research employing the transnational perspective broadly understood, including specific analysis of remittances and return, two well-established topics that may relate to transnational practices. In addition to these, in the late 1990s and early 2000s some studies focused on the circulation of Portuguese emigrants during the 1960s and early 1970s and its economic and social impact. The idea of *va-et-vien* – used to describe mobility between the place of destination, in particular France, and the homeland – was developed by a French team within this framework (Charbit et al. 1997).

Portuguese political transnationalism in particular, especially voting from abroad, has also attracted researchers since the early 2000s (Malheiros and Caldeira 2003; Abrantes et al. 2012), as have issues related to the role of media and communication technologies in facilitating the circulation of information between destinations and homeland. Scholars have also investigated the construction of transnational identities (Klimt 2000), as well as processes of Portuguese economic transnationalism that contribute to the regional development of places of origin. This began with the pioneering work of Silva et al. (1984); more recent perspectives have adopted a more explicitly transnational approach (Marçalo and Peixoto 2012).

Despite these developments, research about the transnational practices of the most recent – highly skilled – wave of emigrants is very scarce, justifying the approach developed in this chapter. Identifying and interpreting contemporary Portuguese emigrants’ transnational practices should help us understand the nature of the transnational social fields of young, highly skilled migrants who leave their homelands in developed countries and travel abroad.

The notion of migrants’ return, meanwhile, is much longer-established in the literature. The idea that return entails a permanent move back to or at least a long-term stay in the country of origin underlies most studies on the subject. Even recent work, such as that of King and Christou (2011, 452), indicate that return migration should be understood as “a physical relocation of the migrant with the intention of staying for some time, maybe permanently, in the place of origin”. It is true that this notion has been questioned by those who emphasise the fluidity and the temporary nature of many return movements. Yet, in most cases, migrants’ return is presented as relatively long-lasting - as with emigration itself.

The study of return may be as old as that of emigration. But the academy's widespread interest in the subject is relatively recent. According to Cassarino (2013), this began in the 1960s. References increased in the following decade, when the first large return movements were recorded after the oil shock of the 1970s and the economic change that followed. This event interrupted the recruitment of migrant workers to Western Europe, which affected workers from the Mediterranean countries. Starting in the 1980s, policies to encourage return were put in place by the host countries' authorities. This phenomenon led to a vast literature on the subject (King and Christou 2011). Gradually, the focus of academic studies of return has fallen on its impacts in countries of origin (Cassarino 2013).

Already in the 2000s there was a resurgence of interest in return, not so much as a consequence of a variation in its numbers, but more its theoretical reconceptualization (King and Christou 2011). This resulted in an increase in references to transnationalism. The contribution of this theoretical perspective on returns has been substantial, calling into question the traditional conceptualization (Cavalcanti and Parella 2013, Cassarino 2013; Carling and Erdal 2014). The idea that there may be multiple returns (and departures), or that double residences are common, diminishes the heuristic capacity of theories that regarded return as "permanent" and definitive. Attention was also drawn to the "porous boundaries" between long-term return and frequent visits, calling into question the classic paradigm of returns (Carling and Erdal 2014).

Despite their importance, studies on return account for only a minority of academic publications on emigration in Portugal; they are scarce and have several shortcomings (Rato 2001; Cairns et al. 2014). The bibliometric analysis undertaken by Candeias et al. (2014a, b) indicates that they account for about 8% of all publications. Still, according to these authors, publications on return became more common in the 1980s. Some of the main texts from this period are the already cited Silva et al. (1984) and Monteiro (1994).

From the end of the twentieth century, the literature on Portuguese emigration underwent an important quantitative and qualitative shift (Pires et al. 2010). Firstly, it was believed that outflows would remain at residual levels – a prediction that would not be confirmed. At the same time, there was a marked change in the characteristics of emigration. On the one hand, long-term departures were increasingly replaced by temporary movements. On the other hand, the profile of the emigrants changed, as departures of skilled workers and people from urban areas became more common. Studies about transnationalism and return in this new context, particularly after the turn of the century, are very scarce. As regards return, the most notable exceptions are studies on the second generation (Portuguese descendants, who in some cases were even born in the countries of origin) (e.g. Neto 2010; Sardinha 2011) and the return of scientists and researchers (Delicado 2010). It was only more recently that Oliveira et al. (2016) sought to present a comprehensive view of the subject. Even so, the new trends of return remain largely unknown, due to the emergence of new emigrant profiles, new destinations and a new global context of international migration.

3.3 Transnational Links of Recent Portuguese Emigrants

This section aims to analyse the relations that recent emigrants establish with Portugal, based on some of the results of the survey carried out during the project mentioned in the introduction to this chapter – “Back to the future: new emigration and links with Portuguese society” (REMIGR). We will discuss the total number of responses as well as those responses that referred to the six countries that constitute our case studies.

3.3.1 *Methodology*

The project’s methodological design was based on mixed quantitative and qualitative techniques. In addition to the collection of official statistics in Portugal and abroad, this approach included the use of extensive methods – such as an online and paper questionnaire survey – complemented by 45 semi-structured interviews with privileged informants, emigrants and institutional representatives in Portugal and in the countries of destination analysed in the project: the United Kingdom, France, Luxembourg, Brazil, Angola and Mozambique.

The quantitative data presented below resulted from a questionnaire distributed online and in paper form. Both online and paper questionnaire surveys have some associated limitations. By using both formats we sought to minimise these limitations and to fulfill two objectives: on the one hand, to cover the largest possible number of Portuguese emigrants, with particular emphasis on the residents of the countries under analysis; on the other hand, to diversify the profile of the respondents as much as possible.

The research subjects were all individuals older than 18 years of age residing in a foreign country, who either had Portuguese nationality or were born in Portugal, and who had left Portugal after 2000. The questionnaire was disseminated on the Internet between May 2014 and May 2015. Over the same period, the team proceeded with fieldwork in the countries under review, distributing the survey in the United Kingdom, France, Luxembourg, Brazil, Angola and Mozambique. Fieldwork ran from mid-2014 to late 2015. The total number of valid responses was 6086, of which 4428 were online and 1658 on paper. The data were then processed and analysed using SPSS statistical analysis software.

The study’s methodology had several limitations. First, and above all, the non-representativeness of the sample means that results cannot be generalised for new Portuguese emigration, either as a whole or by country of destination. The main bias is towards highly skilled emigrants, who do not constitute the majority of recent departures. They account for about 70% of respondents, while several sources confirm that this segment was not predominant among emigrants in recent years (Pires et al. 2014). Second, aggregating responses at the country level ignores diversity

within the host country, which in some cases is very high.¹ Third, given the high number of responses in the United Kingdom – about 24% – the “total countries” category is largely influenced by the responses obtained in this country. Finally, the importance of the context *versus* individual characteristics has not been tested, i.e. it is not known whether there is any context effect that justifies a future multilevel analysis, or whether the trends identified result exclusively from subjects’ individual characteristics.

3.3.2 Links with Portugal

The first indicator of transnational practices is emigrants’ visits to Portugal (Fig. 3.1). In total, more than half of the respondents (56%) reported coming to Portugal frequently, i.e. at least once every 6 months. Those who indicated that they “never” or “rarely” came were only 13%. Some interesting contrasts emerge between the return patterns of emigrants from different destination countries. Unlike many of the indicators on recent emigration, the frequency of home visits does not seem to be linked – among these countries – to whether destination countries are inside or outside Europe, and nor is geographical proximity the dominant factor. Portuguese emigrants in Angola, a country farther away than European destinations, have the highest frequency of visits, slightly higher than those from the United Kingdom. Several factors may explain this relative absence of a geographical pattern. First, Angola may be a special case due to the existence in this country of work agreements that include home visits supported by the employer – often a Portuguese

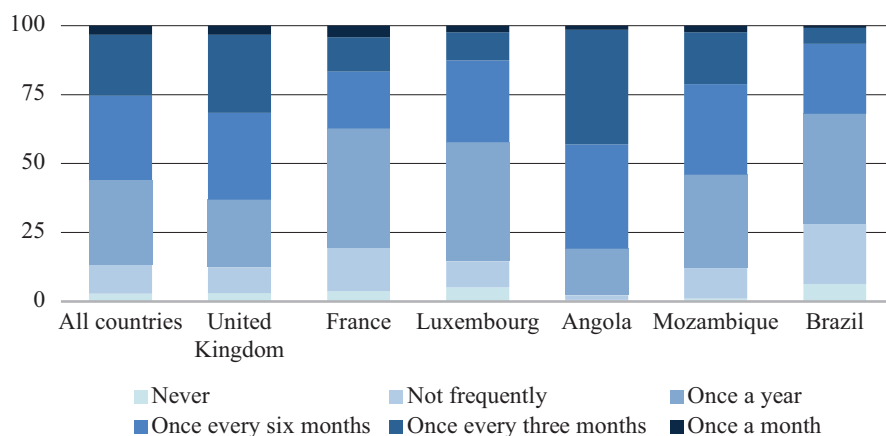


Fig. 3.1 Frequency of home visits (%).

Source: Survey of Portuguese Abroad – REMIGR Project

¹For example, the differentiation in the UK between residents of the London area and residents of the Norfolk area; or the differentiation in Brazil between residents of the States of Rio de Janeiro and São Paulo, and those in the Northeast.

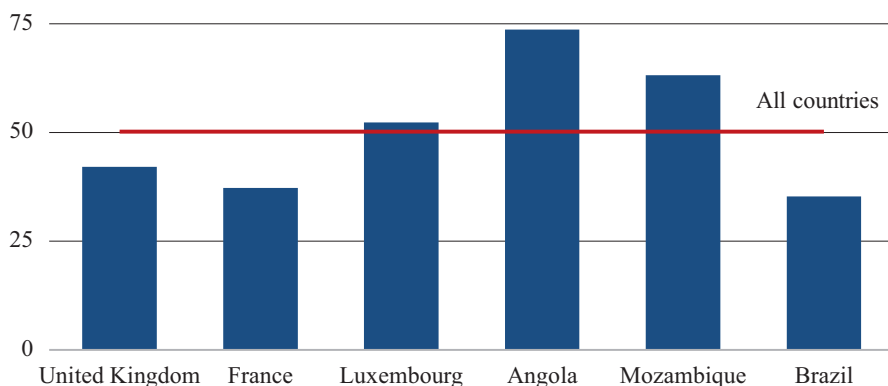


Fig. 3.2 Proportion of respondents that sends remittances (%).

Source: Survey of Portuguese Abroad – REMIGR Project

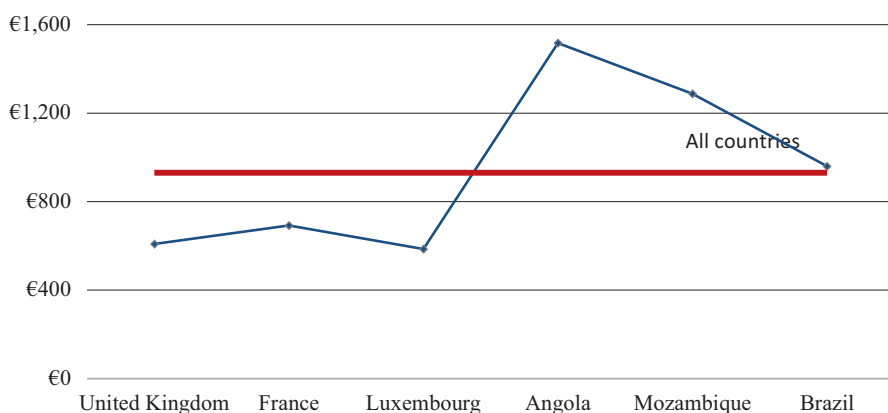


Fig. 3.3 Average monthly amount of remittances (euros).

Source: Survey of Portuguese Abroad – REMIGR Project

company. Within Europe, the higher values registered in the United Kingdom can be explained by the fact that it receives more qualified emigrants who are less oriented towards saving money, unlike France and Luxembourg. The wider availability of low cost flights may also facilitate home visits.

A second indicator of transnational practices is the sending of remittances. The proportion of respondents that regularly sends remittances is about 50% (Fig. 3.2). Among the countries we studied, Angola, Mozambique and Luxembourg are the most significant in this regard. This may be due to a higher incidence of temporary emigration (in the case of African countries) or to the greater dependence of families in the country of origin on emigrants (in the case of Luxembourg, which experiences emigration closer to the traditional type).

As we can see by looking at the average monthly amount of remittances from destination countries (Fig. 3.3), European countries tend to be associated with

reduced remittances. This is probably due to migrants here generally being younger – sometimes without dependents in the country of origin – and more orientated towards local consumption or with lower incomes. Among the group of non-European countries, Angola is the destination responsible for the highest volume of remittances, followed by Mozambique. In Angola's case, the fact that some companies pay their workers' salaries directly into Portuguese accounts contributes to these high values. The lower volume of remittances sent from Brazil may be explained by the high cost of living in certain Brazilian cities (Rosales and Machado 2015).

It should be noted, however, that the figures presented here do not match official statistics. According to data from 2013 (Vidigal and Pires 2014), the main countries from which remittances originated were, in this order, France, Switzerland and Angola, with France's figures close to three times Angola's. However, we must take into account the fact that official statistics on remittances record the volume sent by the entire emigrant community. Migrants arriving after 2000, who are naturally less numerous and in many cases in a worse economic situation, are not singled out.

3.3.3 Future Plans

Finally, we come to emigrants' plans for the future, which can be summarised under three headings: settlement in the country to which they emigrated, return to Portugal, or re-emigration to another country (Fig. 3.4). The largest group of respondents were those who declared themselves undecided – around 32%. Next came those who declared that they wanted to return to Portugal (29%) and those who intended to stay in the country to which they emigrated (28%). Despite the relatively balanced diversity of the answers (all categories accounted for around 30% of the total, with the exception of “re-emigrate”, which accounted for only about 10%), as well

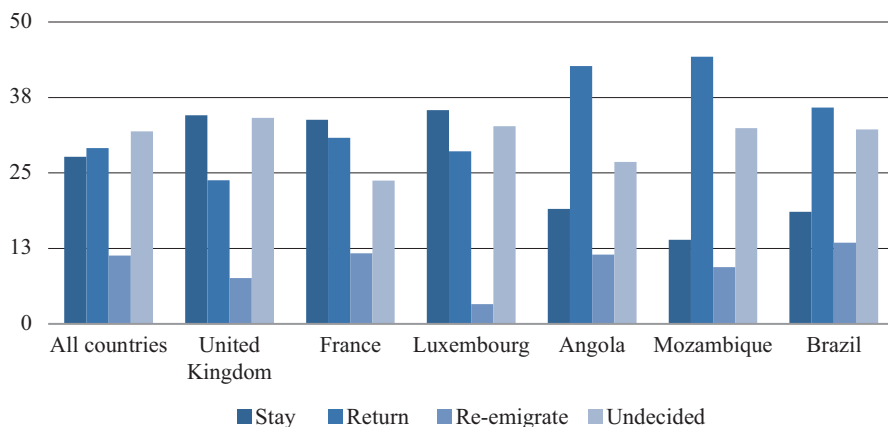


Fig. 3.4 Plans for the future (%).

Source: Survey of Portuguese Abroad – REMIGR Project

as the uncertainty associated with all recent migration projects, aggravated by an unstable economic environment and a changing international political reality – the figures confirm that the intention to return is widespread and that many emigrants, at least implicitly, accept that their current migration project is not definitive.

In the three European countries, the plan to settle is the most prevalent. It is possible to explain this result by these countries' geographical proximity to Portugal, which allows for relatively regular trips; by their cultural similarity (which is of course also a factor in Portuguese-speaking destinations); and by their comparative economic and social stability. Even so, this plan is held by less than half of the respondents in the European countries under analysis.

The second option, the plan to return, was the most frequently selected in non-European countries, especially Angola and Mozambique, where more than 40% declared that returning was their intention. Perhaps the motivations that led the respondents to emigrate to these countries are relevant here – since they often consisted in the desire for “new experience” and engagement in temporary work projects – as is the context of instability in these countries (see Peixoto et al. 2016).

Onward migration plans are held by a minority of emigrants in all the countries studied, accounting for just over a tenth of the responses. The country where the highest proportion of onward migration plans was detected was Brazil. Such plans may be more prevalent where there is a higher proportion of emigrants who can be classified as cosmopolitan, and who fit the profile of global citizens with multiple affiliations, that often go beyond the borders of nation states (Vertovec and Cohen 2002). It is also among this group that lifestyle-based migration may predominate (Rosales and Machado 2015).

Many migrants, however, remain undecided: almost 1/3 of the total sample. Although this is not the predominant category in any of the countries under study, in the United Kingdom it has practically the same weight as the plan to settle. The significance of this category reveals that recent migratory paths are extremely fragile, and still highly dependent on factors affecting initial integration, as well as on changes in both the country of origin and destination.

3.4 Return Migration: The Other Face of Emigrants' Circulation

Research into returning emigrants reveals a special relationship between those who emigrated and their country of origin, namely the accomplishment of a temporary strategy of stay abroad, keeping the links with the sending country. A considerable number of emigrants have indeed come back to Portugal in recent decades. The 2011 INE census provided information on the number of individuals who had been born in Portugal, lived abroad for more than 1 year, returned to Portugal and resided there in 2011. This section provides information on this flow, focusing only on returns that occurred between 2001 and 2011.

3.4.1 Methodology

The last Portuguese Census introduced two new questions about previous residence outside the country.² The question asked in the 2011 Census was: “Have you ever lived outside Portugal for a continuous period of more than one year?” If the answer was yes, the respondents indicated the country and the year they had returned to Portugal. In this section we explore respondents’ answers to these two questions in order to better understand return migration. Returned emigrants were defined as Portuguese-born respondents who had resided outside the country for at least 1 year.

According to the Census, there were about one million returned emigrants in 2011, i.e. almost 10% of the resident population. These figures are not a fully accurate indication of the number of returning emigrants, as they ignore both returnees who have died and those who have re-emigrated. Even so, the numbers from the last census point to the magnitude of return in the last decades: more than 213 thousand emigrants returned during the 1980s and more than 227 thousand during the 1990s. Between 2001 and 2011 more than 233 thousand emigrants returned to Portugal. This number includes only those who were born in Portugal and lived in a foreign country for at least 1 year (that is, short-term migration is not accounted for in these figures, since only periods of over 1 year are considered). The obvious conclusion is that emigration has not been one-sided over time, as many emigrants did not remain in their destination country, and later returned to Portugal.

3.4.2 Destination Country and Return

The first approach to examining the return flow in recent years (2001–2011) begins by looking at the returned emigrants’ geographic dispersion (Table 3.1). The most significant flows were from France (26%), the country with the largest number of Portuguese emigrants (more than half a million), resulting from a major and long-standing migratory flow since the 1960s (Pires et al. 2010).

Two other countries associated with recent emigration – Switzerland, which has been a destination country since the 1980’s (Marques 2008), and Spain, an important destination in the last decades but where the recessive effects of the post-2008 crisis were particularly significant (Pinho and Pires 2013) – became a significant source of returning emigrants (circa 13% and 11%). Next, we find emigrants returning from the United Kingdom (10%), a country for which the current wave of emigration is even more recent and intense (Pires et al. 2014). Germany, a traditional destination for Portuguese emigrants (Pires et al. 2010), is also an important source

²The Census also provides information about residence at specific moments. The 2011 census showed that about 85 thousand Portuguese-born respondents were living abroad on 31 December 2005 and about 43 thousand were living abroad on 31 December 2009.

Table 3.1 Countries of emigration of returned emigrants between 2001 and 2011

| Countries | N | % |
|----------------|----------------|------------|
| France | 60,582 | 26.0 |
| Switzerland | 29,469 | 12.6 |
| Spain | 26,615 | 11.4 |
| United Kingdom | 23,077 | 9.9 |
| Germany | 18,809 | 8.1 |
| USA | 11,153 | 4.8 |
| Brazil | 7542 | 3.2 |
| Luxemburg | 5720 | 2.5 |
| Canada | 5525 | 2.4 |
| Netherlands | 4880 | 2.1 |
| Angola | 4715 | 2.0 |
| Belgique | 4431 | 1.9 |
| Venezuela | 3950 | 1.7 |
| Andorra | 2571 | 1.1 |
| Italy | 2446 | 1.0 |
| South Africa | 2250 | 1.0 |
| Mozambique | 2156 | 0.9 |
| Cape Verde | 1129 | 0.5 |
| Ireland | 1098 | 0.5 |
| Bermuda | 1090 | 0.5 |
| Others | 14,113 | 6.0 |
| <i>Total</i> | <i>233,221</i> | <i>100</i> |

Source: Own calculations, based on INE, Census 2011

of returning emigrants (8%). These five European destinations were the source of 70% of returning emigrants between 2001 and 2011.

These figures confirm the polarization of return migration from European countries, which have been the major destinations of Portuguese emigration over the past five decades. These figures reflect, on the one hand, the oldest emigration flows to European countries (France, Germany and Switzerland) and, on the other hand, the greater tendency towards short- and medium-term migration to new destination countries (Spain and the United Kingdom).

Countries with a strong history of Portuguese emigration – and therefore those with a large and older stock of emigrants, which also happen to be geographically more distant (US, Canada and Brazil) – are associated with a smaller number of returns than the new European destinations.

The larger geographical distance and a perception of emigration as a longer-term change in the life cycle probably contributed to a stronger tendency towards long-standing emigration to traditional non-European destinations, rather than to those that are geographically closer, where language barriers are less significant and long-term plans less frequent. Historical issues associated with the self-perception of some countries (e.g. Canada or the US; even Brazil) as “emigrant-based nations” may also contribute to the construction of a “culture of stay” which encourages

Table 3.2 Return rate between 2001 and 2011

| Countries | % |
|----------------|------|
| France | 10.1 |
| Switzerland | 21.9 |
| Spain | 34.3 |
| United Kingdom | 35.9 |
| Germany | 25.9 |
| Brazil | 4.3 |
| Luxembourg | 11.2 |
| Canada | 3.8 |
| Netherlands | 39.6 |
| Italy | 52.0 |
| Ireland | 77.4 |

Source: Own calculations, based on INE, Census 2011

definitive settlement. Portuguese emigrants, particularly of older waves, have not certainly been immune to this perception and its impact.

Emigrants' propensity to return can be identified by the return rate³ (Table 3.2). The chances of return vary greatly depending on the destination country. Traditional destinations (especially Canada and Brazil, but also France and Luxembourg) have very low return rates, falling below 12%. On the contrary, for Portuguese emigrants in Ireland and Italy, return rates exceed 50%. Between these extremes, we find the return rates from the Netherlands, the United Kingdom and Spain (between 34% and 40%). Therefore, relatively recent emigration tends to be of a shorter duration and perhaps, in many cases, repeated migration. These figures also show that many returns occur not long after emigration.

3.4.3 *Return and Life Cycle*

Statistics on the age structure of returning emigrants show that many are young adults. This contradicts the usual idea that they come back at retirement age. In fact, the association between return migration and the elderly is strongly associated with the high proportion of older people among the population that emigrated several decades ago (Fig. 3.5).

The clear majority of recently returned emigrants are adults of working age (particularly between 25 and 50) and emigrants near retirement age (mainly between 60 and 75). The next sections focus on these groups.

³The return rate is the ratio between the returns from 2001–2011 and the average stock of Portuguese-born population in each country. Return rates measure the probability of an emigrant who has resided abroad during the past decade returning to their home country during the same period (regardless of the arrival date in the destination country).

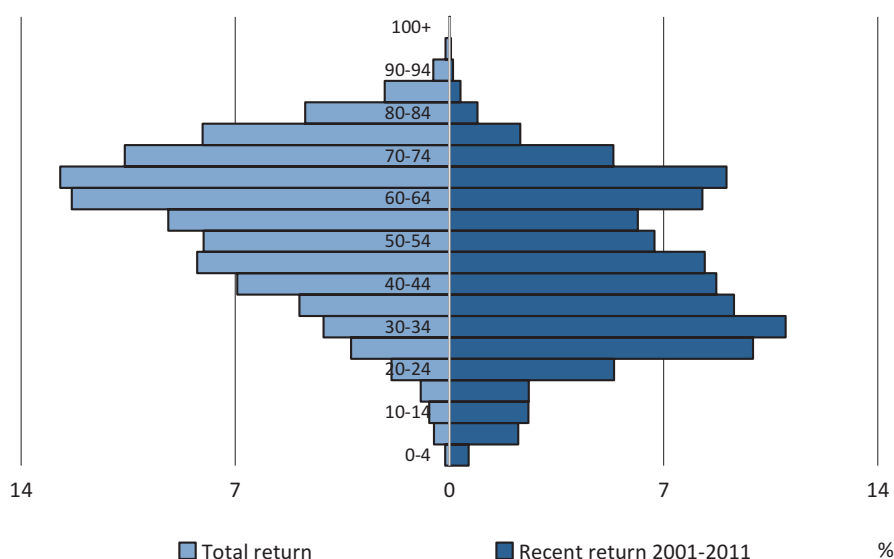


Fig. 3.5 Emigrants' return, total and 2001–2011, by age group (%).

Source: Own calculations, based on INE, Census 2011

3.4.3.1 Returnees of Working Age

The working age emigrants who come back to Portugal account for the majority of returns, and are a much larger group than that of retirement-age returnees: about 153 thousand were between 20 and 59 years⁴ in the 2011 census (almost 66% of the total flow during the decade).

These working-age returned migrants can be described according to several sociodemographic variables (Table 3.3). They tend to be predominantly men (more so than the older returnees): almost 60% of the total. They also have significantly higher levels of education than the older returnees. The two lowest education categories account for 26% of working-age returnees, while they accounted for 88% of retirement-age returnees. Most common are individuals who have completed the sixth or the ninth grade (42%), though many also have higher qualifications: upper secondary (13%) and tertiary education (17%).

Returned emigrants aged between 20 and 59 are mostly in the labour market: 61% were employed and 16% unemployed. All other categories are of minor significance, with the exception of housewives (6%).

⁴We exclude individuals aged under 20 from the analysis for two main reasons: among recent returns, 94% of returnees aged 0–19 were family dependents; on the other hand, the criteria of place of birth in Portugal would exclude any children of emigrants born in destination countries (its proportion is not independent from the country of emigration, so no comparison is possible). It is also important to clarify that returnees' ages at the time of the census were not the ages at which they returned to Portugal. For recent returns (2001–2011) they were, on average, 5 years younger.

Table 3.3 Returned emigrants aged 20–59: sociodemographic characterization

| Indicator | N | % |
|--|----------------|-------------|
| Sex | | |
| Male | 90,914 | 59.5 |
| Female | 61,887 | 40.5 |
| <i>Total</i> | <i>152,801</i> | <i>100</i> |
| Education | | |
| None | 5434 | 3.6 |
| Primary school | 34,199 | 22.4 |
| Lower secondary school | 64,714 | 42.4 |
| Upper secondary | 20,543 | 13.4 |
| Higher education | 25,979 | 17.0 |
| <i>Total</i> | <i>150,869</i> | <i>98.7</i> |
| Occupational status | | |
| Pensioners | 4795 | 3.1 |
| Employed | 92,698 | 60.7 |
| Unemployed | 23,762 | 15.6 |
| Housewives | 9623 | 6.3 |
| Students | 4272 | 2.8 |
| Disabled | 3844 | 2.5 |
| Other | 13,807 | 9.0 |
| <i>Total</i> | <i>152,801</i> | <i>100</i> |
| Occupation (employed individuals) | | |
| Managers and professionals | 20,383 | 22.0 |
| Technicians, clerks, service and sales workers | 28,518 | 30.8 |
| Skilled agricultural and fishery workers | 3043 | 3.3 |
| Craft and related trades workers, plant and machine operators and assemblers | 27,742 | 29.9 |
| Elementary occupations | 12,578 | 13.6 |
| <i>Total</i> | <i>92,264</i> | <i>99.5</i> |
| 15 main countries of return | | |
| France | 25,599 | 16.8 |
| Switzerland | 24,465 | 16.0 |
| Spain | 22,500 | 14.7 |
| United Kingdom | 19,161 | 12.5 |
| Germany | 11,176 | 7.3 |
| USA | 6306 | 4.1 |
| Brazil | 4449 | 2.9 |
| Luxembourg | 3976 | 2.6 |
| Netherlands | 3973 | 2.6 |
| Belgium | 3345 | 2.2 |
| Angola | 3216 | 2.1 |
| Canada | 3047 | 2.0 |
| Venezuela | 2279 | 1.5 |
| Italy | 2146 | 1.4 |
| Andorra | 2106 | 1.4 |

Source: Own calculations, based on INE, Census 2011

Occupations were also recorded, but only for the population that was employed at the time of the census. There were two major categories. One comprised mid-level specialists, administrative staff and personal service, protection, security and sales workers, which accounted for 31% of the emigrants who had returned in the last 10 years. The other comprised skilled manufacturing workers, construction and craft workers, machine and equipment operators, and assembly professionals, accounting for 30%. The third largest category comprised emigrants in more highly qualified occupations, such as managers and intellectual and scientific specialists, accounting for 22%. Unskilled workers accounted for 14% and farm and fishery workers for very small percentages.

These emigrants returned from a wide range of countries of origin, showing that migratory destinations are currently less concentrated than before. Although France was still the main origin (17%), Switzerland accounted for almost the same percentage of returnees (16%), followed by Spain (15%) and the United Kingdom (13%). These four countries were far ahead of all the others and altogether were the origin of 60% of returning emigrants. A significant number of emigrants also returned from Germany and the United States, though at much lower percentages (7% and 4% respectively). All other origins accounted for a much lower proportion of returnees, although their presence in the census did show the significant geographical dispersion of Portuguese emigration.

3.4.3.2 Returnees of Retirement Age

Emigrants who returned when they stopped working or retired, i.e. those aged 60 and over at the time of the census, number almost 62 thousand (only 26% of the return flow in 2001–2011). Their sociodemographic characteristics (Table 3.4) show that they were mostly male (55%) and had low educational attainment: over half had only completed primary school (64%) and almost one quarter had not completed any level of education (24%). These low education levels account for 88% of the elderly. At the other end of the scale, there were very few who had higher education degrees (3%) or upper secondary school diplomas (2%). In most cases, these individuals were pensioners (82%), with only a few housewives (6%) and employed (5%).

Most of these emigrants came back from France (52%). All the other destinations were much less significant. Germany was the second most common (11%). The United States (7%) and Switzerland (5%) were also important. These four countries accounted for 74% of the elderly emigrants who returned during the 2001–2011 period. If we add two other traditional emigration destinations, Canada and Brazil, these together account for 81% of emigrants returning at the end of their migratory cycle.

Table 3.4 Returned emigrants aged 60 and over: sociodemographic characterization

| Indicators | N | % |
|-----------------------------|---------------|------------|
| Sex | | |
| Male | 33,695 | 54.7 |
| Female | 27,933 | 45.3 |
| <i>Total</i> | <i>61,628</i> | <i>100</i> |
| Education | | |
| None | 14,695 | 23.8 |
| Primary school | 39,654 | 64.3 |
| Lower secondary | 4163 | 6.8 |
| Upper secondary | 1327 | 2.2 |
| Higher education | 1777 | 2.9 |
| <i>Total</i> | <i>61,616</i> | <i>100</i> |
| Occupational status | | |
| Pensioners | 50,612 | 82.1 |
| Employed | 2934 | 4.8 |
| Unemployed | 747 | 1.2 |
| Housewives | 3740 | 6.1 |
| Disabled | 926 | 1.5 |
| Other | 2669 | 4.3 |
| <i>Total</i> | <i>61,628</i> | <i>100</i> |
| 15 main countries of return | | |
| France | 32,279 | 52.4 |
| Germany | 6585 | 10.7 |
| USA | 4089 | 6.6 |
| Switzerland | 2759 | 4.5 |
| Canada | 2094 | 3.4 |
| Brazil | 1858 | 3.0 |
| United Kingdom | 1586 | 2.6 |
| Venezuela | 1560 | 2.5 |
| Spain | 1290 | 2.1 |
| Luxembourg | 1228 | 2.0 |
| South Africa | 1218 | 2.0 |
| Angola | 883 | 1.4 |
| Belgium | 698 | 1.1 |
| Netherlands | 585 | 0.9 |
| Mozambique | 553 | 0.9 |

Source: Own calculations, based on INE, Census 2011

3.4.4 Typology of Return Flows

A cluster analysis of the countries from which recent returns are occurring shows that the new Portuguese emigration is accompanied by new patterns of return, particularly among the younger population. The cluster analysis by country of

Table 3.5 Typology of returns - cluster analysis based on countries of emigration

| | Traditional destinations | Continuity and change | Lusophone and others |
|-------------------------|-----------------------------|----------------------------|----------------------------|
| Total flow | 102,386 thousand (47.7%) | 83,578 thousand (39.0%) | 28,465 thousand (13.3%) |
| Male (%) | 55.5 | 60.0 | 60.7 |
| Mean age (years) | 54.5 | 40.6 | 44.4 |
| Education (in years) | 5.6 | 8.3 | 10.4 |
| Unemployment (%) | 13.5 | 17.2 | 14.2 |
| Retired (%) | 43.6 | 8.0 | 14.5 |
| Skilled occupations (%) | 15.6 | 20.0 | 39.6 |
| 3 main countries | France (27.0%) | Switzerland (12.7%) | Other countries (6.5%) |
| | Germany (8.3%) | Spain (11.1%) | Brazil (2.9%) |
| | USA (4.8%) | United Kingdom (9.7%) | Angola (1.9%) |

Source: Oliveira et al. (2016)

emigration reveals three different groups (Table 3.5)⁵ (for more details, see Oliveira et al. 2016).

The first cluster includes the countries with a long tradition of emigration (“traditional destinations”). They account for almost half of returnees (48%). These returnees tend to be older, have very low levels of education and a significant percentage are retired. Within this group, France stands out because of its relative importance (accounting for more than half of the returnees in this group), but also because it is the country whose returnees best exhibit two of the fundamental characteristics of this group: low education and having retired. We can consider this a traditional cluster: these are old destinations from which emigrants return predominantly at the end of their working life.

The second cluster comprises new European destinations from which Portuguese emigrants are returning (“continuity and change”). It accounts for almost 40% of returnees in the decade. This group has different characteristics from the previous one: it has a greater percentage of men, and a much younger and more educated population. This cluster has the lowest proportion of retired returnees, but is the one with the highest incidence of unemployment. Switzerland, Spain and the United Kingdom are the most important origins in this cluster. In spite of its heterogeneity, this second cluster seems to be a group characterised by new patterns of return, albeit with elements of continuity: these are European destinations to which emi-

⁵The variables considered for each country were: sex (percentage of male migrants), age (mean age), education (average number of years of schooling, corresponding to the level of education completed), retirement (percentage of returnees who have retired), unemployment (percentage of returnees who are unemployed between the ages of 20 and 60), professional status (percentage in skilled occupations, i.e. in the categories “representatives of the legislative and executive administration, directors and executive managers” and “specialists in intellectual and scientific activities”).

grants travel for both more and less skilled jobs and end up in very different post-return situations.

Finally, the third cluster comprises Lusophone countries and Italy, among other minority destinations (around 13%) (“Lusophone and others”). This group’s returning migration flows are mostly male, with an average age between that of the two previous groups. Its returnees have the highest level of education of all the clusters and, therefore, it naturally has the largest proportion of individuals in qualified occupations. Unemployment and retirement have intermediate values, as occurs with age. It is a group whose returnees have different profiles. This cluster includes mostly Lusophone countries outside Europe that have experienced a recent reactivation of migratory flows (Brazil and countries in Africa), but which are also marginal destinations that lie outside the main trends of Portuguese emigration. This group tends to account for the more educated emigrants, who integrate better into the labour market upon return.

3.5 Conclusion

The available statistics and research, produced either in Portugal or in destination countries, support the statement that Portuguese emigration never actually ended and in fact recently increased dramatically. New outflows seem more complex than in the past, since temporary movements (i.e. of emigrants who intend to remain abroad for less than 1 year) have increased steadily, outnumbering permanent emigration (i.e. of emigrants who intend to remain abroad for 1 year or more). Both have shown resilience over the past few decades and both experienced an upsurge at the start of the new century. There seem to be four phases of evolution. Emigration remained steady and not very high between 1992 and 2000, increased between 2001 and 2007, dropped slightly in 2008–2010 and rose sharply after 2011. However, more recently, with the improvement of the Portuguese economy and the emergence of a positive national image that is tentatively optimistic for the future, a new slow-down seems to be occurring.

Despite this continuity in Portuguese emigration and its increase between 2001 and 2014 (with a break in 2008–2010), there are still various gaps in our knowledge about the most recent emigration wave. The REMIGR project helps shed more light on the features of Portuguese emigration in the first decade of the twenty-first century, including the development of connections with emigrants’ home country. This chapter has explored precisely some of these links, completing the analysis with an overview of Portuguese returns between 2001 and 2011. As mentioned at the beginning of the chapter, the recent reconceptualisation of return – incorporating issues such as temporary returns and international double residence strategies – enabled the development of theoretical (and empirical) approaches linking it with transnationalism. These have therefore been the two conceptual pillars of the chapter, which has empirically explored the links of recent Portuguese emigrants to their home country.

Recent Portuguese emigrants have sustained the two practices that serve as basic indicators of connections with the home country – visits to the country of origin and remittances – but have done more of the first (more than 50% visit Portugal more than once a year) and ultimately less of the second (only about 50% regularly send remittances). This picture, which hides some differences between the various destination countries, shows that emigrants – particularly those that are highly skilled – do exploit the increasing opportunities for international circulation (relatively low cost and high frequency of transport, etc.). This means that the myth of a definitive return to the home country is in the end being challenged by an increasingly mobile world (at least for some migrant groups). Having said this, the relatively high monthly average amounts remitted by Portuguese emigrants working in non-European countries, particularly Angola and Mozambique (between 1200 and 1600 euros per month), point to a focus on the origin country and also to the assumption that their current migration is temporary. In fact, these are precisely the two groups of emigrants that, when asked about their future intentions, mostly state that they want to return to Portugal.

Therefore, while we can identify changes in the mobility of some emigrants and an eventual reduction in their transnational financial practices involving the home country, other emigrants keep the home country as the centre of their social lives and hold on to returning as a goal, even if the interpretation of returning as a single and unified phenomenon is currently being challenged.

Indeed, 2011 Census data on individuals born in Portugal who have resided abroad for more than 1 year but currently live in Portugal show a surprising number and diversity of returns. Taken as a whole, almost 10% of the current Portuguese population has lived abroad and returned (although decolonization boosts this figure, since the ex-colonies are now classified as foreign countries). Moreover, the number of returns has increased since the 1980s and totalled more than 233,000 people between 2001 and 2011. These returned emigrants come from all over the world, particularly from the main destination countries such as France, though the number of those coming back from recent destinations, such as Spain and the UK, is increasing. This large flow is even more significant as it involves long- and medium-term and not just temporary emigrants. These data confirm that contemporary emigration is much more than a one-way path, since many outflows are followed by returns – and possibly by further circulation.

The characteristics of returning emigrants differ considerably depending on their country of origin and the age at which they return. People returning from traditional destinations, such as France, are mostly older and have reached retirement age. On the other hand, people coming from new destinations, such as Spain and the UK, are mainly young adults. The characteristics of older and younger returnees also diverge. The older ones fit into the traditional profile of Portuguese emigrants – low skilled people coming from well-known destinations. The younger ones represent an emerging profile – they have more heterogeneous skills and come from a wider range of destinations. These figures seem to tell different emigration stories. Traditional emigration flows are followed, as they always have been, by many returns at the end of the migratory cycle. New emigrants, on the other hand, become

part of a mobile world, where emigration is not a single event followed by an eventual “final return”. In fact, emigration seems more and more to consist of complex, fragmented and multilateral movements.

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